# **Summit Overview**

## The Facilities Management Dashboard



### **Welcome to the Facilities Management Dashboard**

As a Facilities Manager, you now have access to the Summit Facilities Management Dashboard. This dashboard provides data pertinent to your day-to-day processes.

When you access the Facilities Management Dashboard, your default view will be the **Summary** tab. This tab provides you with high-level activities related to key business drivers. You will also have access to the **Demographics** tab. This tab is a good reference point for your non-financial information for Fund Balance, Budget Balance, and Non-Sponsored Projects, including Speedtype.

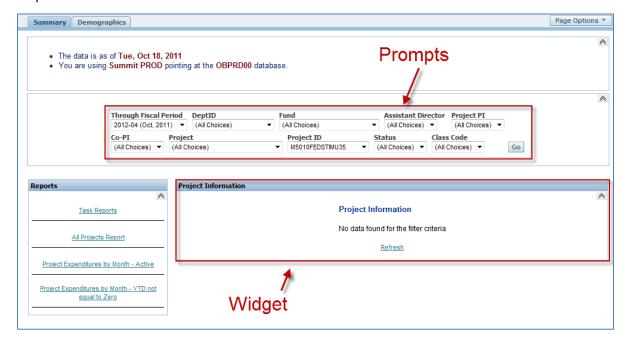
#### How do I view Dashboard information?

You can refine the data displayed in the Summary tab widgets by entering values in the Prompt fields on the Summary tab. You should select the Project ID when filling out Prompts. For step by step instructions on the recommended prompt selections, please see the Understanding the Facilities Management Dashboard job aid.

The **Summary** tab provides high-level widgets for the following activity areas:

- Project Information
- Expenditure Summary
- Procurement Summary Open PO Lines

These widgets are displayed in table format. If prompt information does not bring back results for a widget, a message will appear that states "No data found for the filter criteria" as shown in the below example.



#### How do I drill into an activity?

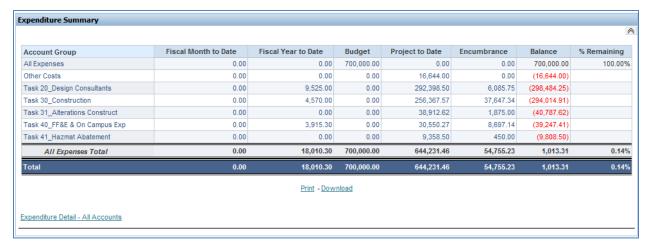
The widgets on the Facilities Management Dashboard provide high-level activities and key data associated with each activity. For example, the Expenditure Summary displays a table of summarized

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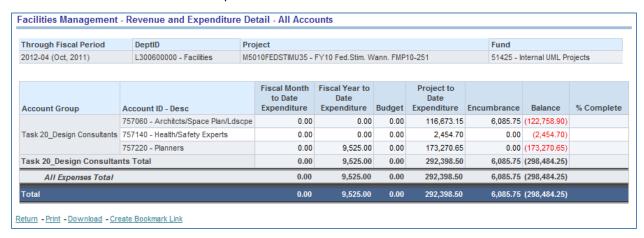
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financial data for those Account Groups with expenditures. Each row displays the Fiscal Month to Date, Fiscal Year to Date, Budget, Project to Date, Encumbrance, Balance, and % Remaining.



You'll notice in the example above that the values in several of the columns are displayed in a blue font (e.g., Account Group, Fiscal Month to Date). Whenever you see values displayed in blue, you can click on that field to drill down into more detailed data about that specific activity. Below is an example of a drill down. Here the user clicked on the Task 20\_Design Consultants Account Group to view more detailed information about that Account Group.



#### Can I print and/or download widgets within the Facilities Management Dashboard?

Yes, each widget will include a **Print** or **Download** link at the bottom of the widget. Print options include HTML and PDF. Download options include Microsoft Excel, CSV, and PowerPoint.

Print - Download

### **For More Information**

A fundamentals tutorial and other online support is available at <a href="http://empac.uml.edu">http://empac.uml.edu</a> in the *Information for..* section. You can also contact <a href="Maura Shield">Maura Shield</a> or <a href="David Mann">David Mann</a> if you have questions.